BARROW COUNTY REAL ESTATE AND GROWTH REPORT Q2 2026

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The Snodon Standard

Stable Market. Changing County.

Home prices held broadly steady while inventory, constructions, infrastructure investment, assessments, and develop ment pressure continued to grow.

WHY SNODON?

Snodon was an early name associated with the settle ment that became Winder. The name gives this quarterly report a specific Barrow County identity while recognizing the place's history and documenting the changes shaping it today.

Barrow County's residential market remained broadly stable during the second quarter of 2026. Closed-sale volume held close to last year, prices changed only modestly, and buyers had more homes to consider without gaining unlimited negotiating leverage.

The larger changes were happening around the housing market. Active inventory increased. Residential construction remained strong. The taxable digest grew rapidly. Water, sewer, transportation, and public-safety investments continued preparing the county for additional demand. Major development proposals also raised harder questions about density, industrial use, traffic, utilities, design standards, and neighborhood compatibility.

The quarter was not defined by a housing collapse. It was defined by a stable market operating inside a county that is still changing.

THE MARKET

Sales volume held steady year over year. Median price softened modestly, average price was nearly unchanged, and buyers gained more time and choice without broad distress.

THE COUNTY AROUND IT

Inventory, permits, assessments, infrastructure spending, and consequential corridor proposals continued changing the environment in which real estate decisions are made.

472
Closed residential sales
Nearly even with Q2 2025

$363,250
Median sale price
Modestly below last year

720
Active listings
Quarter-end inventory

4.58
Months of inventory
Up from 3.94 year over year

256
Residential new-building permits
Issued during Q2

10.9%
Digest growth
Approx. school-system increase

THE Q2 REPORT IN FOUR QUESTIONS

1. What happened in the market?
2. How much supply is forming?
3. Where is growth pressure building?
4. What does it mean for owners?

The housing story and the infrastructure story are becoming inseparable.

This issue connects residential performance with inventory, construction, development decisions, reassessment, public finance, roads, water, sewer, and the practical choices facing buyers, sellers, and homeowners.

Inside: Market performance • Inventory and permits • Development pipeline • Taxes and infrastructure • Buyer, seller, and homeowner guidance

RESIDENTIAL MARKET PERFORMANCE

More Choice, Not a Market Collapse

Sales volume held close to last year, prices remained broadly stable, and buyers gained additional time and alternatives.

THE MARKET IN PLAIN ENGLISH

Barrow County recorded 472 residential closings during Q2 2026, nearly identical to the 470 closings recorded during Q2 2025. Median price declined modestly, average price remained essentially unchanged, and median price per square foot increased slightly.

Homes took longer to sell than one year earlier, but sellers still received 97.245% of original list price on average. The market became more selective and balanced, not distressed.

Three-period market comparison

Metric	Q2 2025	Q1 2026	Q2 2026
Closed sales	470	313	472
Median price	$367,450	$369,990	$363,250
Average price	$392,394	$389,135	$392,464
Median $/sf	$184.74	$181.90	$186.93
Average DOM	48.2	~60.1	52.3
SP/Original LP	97.8%	~96.9%	97.245%
Months supply	3.94	6.65	4.58

PRICE

Median price softened, but average price held nearly flat and price per square foot increased.

PACE

Homes sold more slowly than one year ago, but Q2 improved from the much slower Q1 pace.

NEGOTIATION

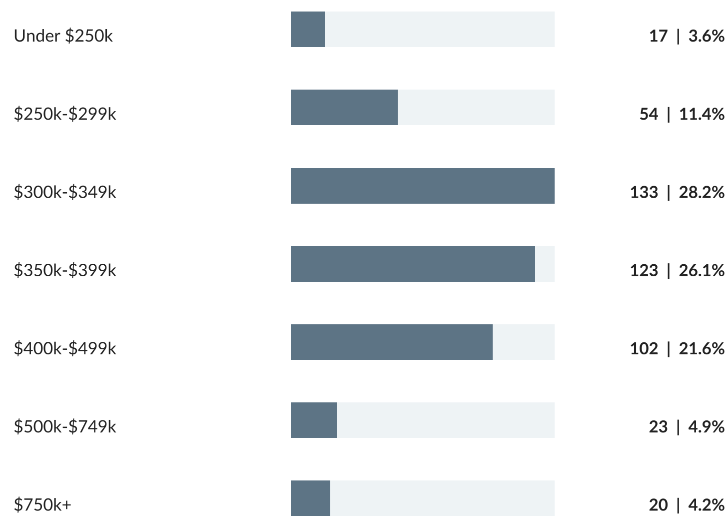
Sellers still received more than 97% of original list price on average.

VOLUME

Closed sales were almost identical to Q2 2025, showing demand remained active.

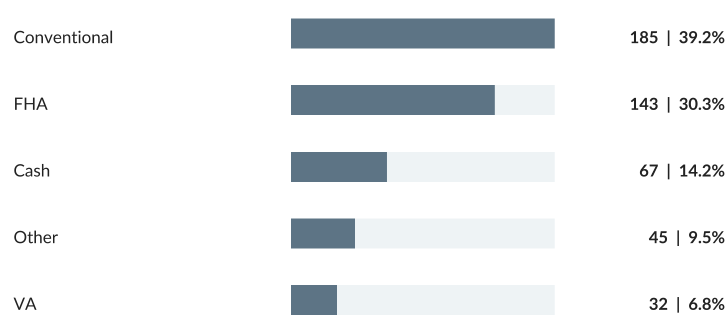
More leverage did not mean unlimited leverage.

Closed sales by price band



75.8% of Q2 closings occurred between $300,000 and $499,999.

Grouped financing mix



WHO AND WHAT CLOSED

Financing: Conventional and FHA represented 69.5% of closings. Cash accounted for 14.2%, so the quarter was not primarily cash-driven.

Property mix: 437 single-family homes, 35 townhouses, and no mobile-home closings.

New construction: 126 closings, up from 112 in Q2 2025, and equal to 26.7% of all Q2 closings.

Market center: Activity remained concentrated from $300,000 to $499,999, where many resale homes compete directly with new construction.

Source: Georgia MLS, Barrow County by physical property location

INVENTORY, SUPPLY AND CONSTRUCTION

Supply Is Growing in More Than One Place

Inventory increased, new listings remained active, and the permit pipeline continued adding future supply beyond homes already visible for sale.

707	452	472
NEW LISTINGS	PENDING ACTIVITY	CLOSED SALES

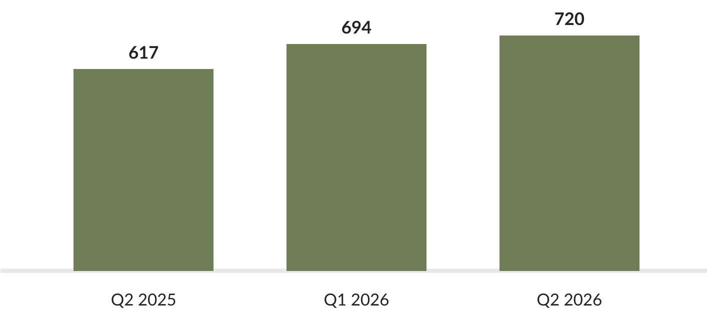
Barrow County ended Q2 2026 with 720 active residential listings, above both Q1 2026 and Q2 2025. Buyers had more homes to consider, but supply must be judged against the pace of closed sales.

Q2's stronger closing pace reduced calculated months of inventory even though the number of active listings continued rising. The result was 4.58 months of inventory, down from 6.65 in Q1 but above the 3.94 months recorded one year earlier.

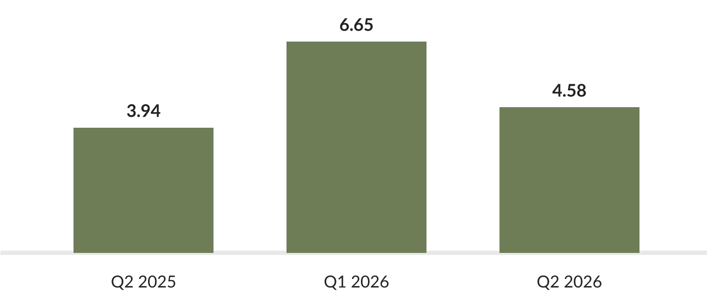
Barrow County issued 256 residential new-building permits during Q2. These permits represent future activity entering the pipeline, not completed homes or guaranteed closings. They reveal supply formation that is not yet visible in active inventory.

At the same time, 126 new-construction homes closed through Georgia MLS, equal to 26.7% of all Q2 closings.

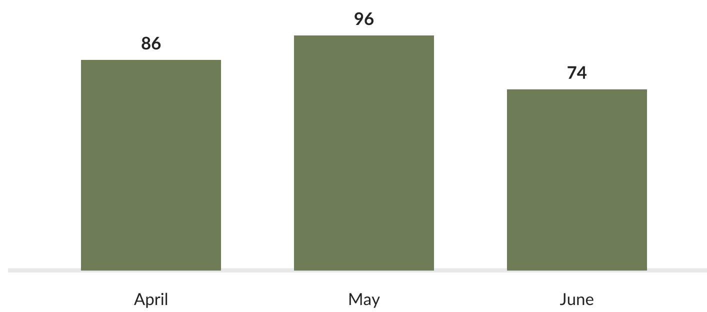
Quarter-end active inventory



Months of inventory



Residential new-building permits



Permit category	Q2
Residential new building	256
Commercial new building	26
Commercial additions	1
Residential additions	10
Residential remodels	14
Replacement mobile homes	1
Land disturbance	8
Demolition	6

WHAT ENTERED THE GROUND-WORK PIPELINE

More listings did not automatically mean more months of supply. Q2's stronger closing pace reduced calculated months of inventory even as active listings continued rising.

Representative Q2 land-disturbance activity included Marbury Landing, Mobley Farms / Equestrian Falls Unit 2, Noble Estates, Winder 316 Overlook, Jim 'N Nick's, grading for six outlots at Bethlehem Springs Boulevard, and a 387,248-square-foot project at 25 Ed Hogan Road.

Pipeline: Permits issued → construction activity → active listings → pending contracts → closed sales. These stages are related but do not represent one identical group of properties.

Growth Is Arriving at Two Different Scales

Small residential changes continue across the county while major corridor proposals raise larger questions about density, industry, traffic, utilities, and neighborhood compatibility.

Growth is occurring through both incremental land changes and larger corridor proposals. The most important distinction is status: staff recommendations, Planning Commission recommendations, and Board of Commissioners actions are separate steps.

CORRIDOR LOCATOR Patrick Mill Road • Atlanta Highway • Highway 211 • Butler Park / Statham area

APPROVED

PATRICK MILL ROAD TOWNHOMES

Up to 48 townhomes on about 12.18 acres, with private HOA-maintained streets and density up to 3.95 units per acre. Approved by the Board of Commissioners, 6-1. The project represents approved higher-density residential growth and continued movement toward attached housing.

TABLED TO AUGUST 11

BUTLER PARK

About 203.78 acres, 29 industrial lots, a ready-mix concrete plant, and roughly 700,000 square feet of industrial space. Regional review projected about 650 to 850 peak-hour trips. Gravity sewer is not adjacent and a roughly two-mile extension may be needed. Statham opposed the proposal. Applicant job and revenue figures remain projections, not county findings.

TABLED TO AUGUST 11

ATLANTA HIGHWAY SELF-STORAGE

Indoor climate-controlled self-storage proposed through changes to a previously approved commercial use. Staff recommended denial; Planning Commission recommended approval with conditions. The Board tabled the case for revised facade concepts, making design and corridor expectations central to the next review.

AUGUST 11 BOC WATCH

HIGHWAY 211 MIXED USE

High-density residential and community commercial uses with multiple variances. The Planning Commission unanimously recommended denial. Later Board consideration was scheduled for August 11. The case is part of a larger debate over density, access, design standards, and the future identity of the Highway 211 corridor.

POLICY AND SUPPORTING CASES

Destination 211 townhome text amendment: changes the rules governing townhome development along the corridor, showing that the county is shaping policy as well as reviewing individual projects.

706 Patrick Mill Road: future-land-use restoration.

Dogwood Trail and Brown Bridge Road: smaller residential developments that add homes incrementally through conditioned approvals.

WHY THE DETAILS MATTER

Traffic estimates, sewer access, facade requirements, parcel conditions, and neighboring-government concerns explain why a case may remain unresolved even when its basic use is familiar. These facts also help nearby owners understand what to watch before a final vote.

Recommendation is not approval. Pending cases remain subject to later official action.

Source: Barrow County planning, zoning and BOC records; pending statuses subject to update

Property Values Are Only Part of the Ownership Story

Assessments, millage rates, public-safety costs, transportation spending, and utility capacity all shape the county's next stage of growth.

THE SCHOOL-SYSTEM NET TAXABLE DIGEST

$4.578B → $5.078B

Increase: $499.7M, approximately 10.9%

About $256.2 million came from reassessment of existing real property and approximately $243.5 million came from other net digest changes. Those other changes should not be described entirely as new construction.

Digest growth composition

FY2026 TO FY2027 BUDGET COMPARISON

Category	FY2026	FY2027	Change
Total budget	$182.05M	$187.69M	+3.1%
General Fund	$66.02M	$68.29M	+3.4%
General Fund taxes	$52.75M	$56.55M	+7.2%
Real-property tax	$20.65M	$21.83M	+5.7%
Public safety	$37.44M	$39.15M	+4.6%
Judicial	$7.60M	$8.82M	+16.1%

Adopted millage rates

Taxing district	Mills
County M&O, incorporated	5.594
County M&O, unincorporated	3.994
Board of Education	15.550
Fire District	2.940
Parks and Recreation	0.500
IBA bond	0.259

SCHOOL MILLAGE VERSUS ROLLBACK

14.426 rollback **15.550 adopted**

A 7.79% increase over rollback does not mean every parcel's bill rose 7.79%.

GENERAL FUND RESERVE DRAW

FY2026: $2.94M **FY2027: $0**

INFRASTRUCTURE PREPARING FOR GROWTH

NORTHWEST TRANSMISSION MAIN

About 25,000 linear feet of proposed 24-inch water main from Carl toward SR 211 and Old Hog Mountain Road. Approximate cost: $12.22 million, including a proposed $2 million ARC grant request and roughly $10.22 million county share. The project supports corridor capacity, regional connections, and fire protection.

SEWER REHABILITATION

The proposed University Parkway Center work includes a new 18-inch gravity sewer and rehabilitation of an existing line to address corrosion, repeated blockages, and insufficient capacity. Estimated project cost: approximately $1.223 million, including an engineering agreement of about $188,000.

TRANSPORTATION COORDINATION

Proposed signal contract: approximately $419,710 for Atlanta Highway, Jackson Trail, and Bowman Mill. Proposed SR 211 land-acquisition services agreement: approximately $34,000. Estimated CSX reimbursable coordination costs: approximately $116,581.

WHAT THIS MEANS FOR HOMEOWNERS

Assessment is not the same as sale price, and a millage rate alone does not determine the final bill. Infrastructure can improve reliability, fire protection, safety, access, and capacity while also supporting additional growth.

FY2027 begins with a larger operating budget, higher public-safety and judicial spending, major transportation and water commitments, and no planned General Fund reserve draw. Owners should watch public investment and private development together because taxes, roads, utilities, public safety, and land-use decisions shape the same ownership environment.

Sources: Barrow County tax, budget, transportation, water and sewer records

WHAT IT MEANS

What the Quarter Means for You

The market remains active, but real estate decisions now require a wider view of inventory, construction, development, infrastructure, and taxes.

BUYERS: MORE CHOICE REWARDS BETTER COMPARISON

Buyers had more choices than one year ago. That creates more room to compare price, condition, builder incentives, financing, road access, utility capacity, traffic patterns, and nearby development. It does not mean every seller is desperate. Well-priced homes can still sell close to asking, and new construction remains an important competitive option.

Countywide headlines should guide the search, not replace property-level analysis. The right comparison includes the house, the competition, and what is changing around it.

HOMEOWNERS: WATCH MORE THAN THE SALE PRICE

Assessment and market value are related but not identical. Exemptions, millage rates, taxing districts, infrastructure projects, and nearby development all matter. Homeowners should follow planning cases, road work, utility projects, and corridor decisions near their property before construction begins.

These changes can affect convenience, neighborhood character, traffic, access, and future buyer perception even when they do not immediately change a home's sale price.

SELLERS: PRICING DISCIPLINE MATTERS MORE

Buyers have more alternatives, so overpricing can increase market time and weaken a seller's negotiating position. Condition and presentation matter more when several similar homes are available. New construction may compete through incentives or financing that are not obvious from list price alone.

A countywide median provides context, but it cannot replace a property-specific market analysis that accounts for condition, lot, subdivision activity, recent comparable sales, and nearby competition.

FORWARD WATCH LIST

During Q3, watch for final action on Butler Park, Atlanta Highway self-storage, and the Highway 211 mixed-use proposal; the pace of residential permitting; quarter-end active inventory; days on market; sale-price-to-original-list-price performance; and progress on major water, sewer, signal, and transportation projects.

The next quarter will show whether Q2's balance holds or whether rising supply begins changing seller behavior more noticeably.

METHODOLOGY AND SOURCE TRANSPARENCY

Residential method: Georgia MLS, Barrow County by physical property location, April 1 through June 30, 2026. Comparison periods are Q1 2026 and Q2 2025. Months of inventory equals quarter-end active inventory divided by average monthly closed sales during the quarter.

Primary public sources: Barrow County Planning Commission and Board of Commissioners records; Tyler EnerGov permit records; Tax Assessor and millage materials; FY2027 approved budget; transportation and water-resource records.

Audit notes: Price per square foot excludes living area under 500 square feet. Pending cases are not presented as approved. One noncredible sale-price-to-original-list-price outlier was excluded. Approximate values remain labeled approximate.

LOCAL GUIDANCE. PROPERTY-SPECIFIC CONTEXT.

Countywide data provides context. Your property deserves a closer look.

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Conversation options
Comparative market analysis
Buyer strategy and property comparison
Neighborhood and development review
Local market consultation

SCAN FOR THE LATEST REPORT